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Final Report of
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January 2001

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Implementing Special Management Zones

Final Report of the Special Management Zone Working Group

January 2001

Land Use Coordination Office
Victoria, British Columbia

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Key Abbreviations Used in this Report (see Glossary)

CCLUP	Cariboo Chilcotin Land Use Plan
EFMPP	Enhanced Forest Management Pilot Project
FPC	Forest Practices Code
FRBC	Forest Renewal British Columbia
HLP	Higher Level Plan
IFPA	Innovative Forest Practices Agreement
IAMC	Inter-Agency Management Committee
KBLUP	Kootenay Boundary Land Use Plan
LRMP	Land and Resource Management Plan
LUCO	Land Use Coordination Office
LUP	Landscape Unit Plan
MELP	Ministry of Environment, Lands and Parks
MEM	Ministry of Energy and Mines
MOF	Ministry of Forests
MSBTC	Ministry of Small Business, Tourism and Culture
RMZ	Resource Management Zone
SDM	Statutory Decision Maker
SMZ	Special Management Zone
SLUP	Strategic Land Use Plan (i.e. LRMP and regional plans)
THLB	Timber Harvesting Land Base
VILUP	Vancouver Island Land Use Plan

Acknowledgments

The Special Management Zone (SMZ) Working Group (members and alternates) consist of individuals with diverse perspectives who have collectively sought to provide broadly supported recommendations.

The Working Group consists of Larry Andrews, Al Balogh, John Bergenske, Jim Burbee, Stan Coleman, Stephen Connolly, Rod Davis, Gerry Fraser, Don Griffiths, Colin Magee, Lloyd Manchester, Graeme McLaren, Dave Peterson, Paul Senez, Roger Shaneman, Bruce Sieffert, David Stuart, Terje Vold, Bill Wareham, Guenter Weckerle and Elizabeth Williams. Previous members include Gordon Goodman and Doug Leavers.

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The SMZ Working Group expresses its sincere appreciation to Forest Renewal BC (FRBC) for making funds available for this project through the Crown Land Use Planning Enhancement (CLUPE) program. This project simply would not have been possible without the helpful support of FRBC.

The SMZ Working Group acknowledges and recognizes all the hard work already undertaken by the dedicated cadre of resource agencies, stakeholders, licensees and planning tables around the province. It is our sincere hope that the recommendations in this report will be embraced by the many individuals and groups involved.

Summary Of Recommendations

Special Management Zones (SMZs), including their objectives, are an outcome of extremely complex and challenging strategic land use planning processes. British Columbia's strategic land use planning program is unique on the world scene in terms of its scope and scale, the overall commitment to inclusiveness, and the significance of the planning decisions.

Local communities, stakeholders, government, and in some cases, First Nations, have committed considerable resources to developing land use plans. For the most part First Nations have not been involved because their main focus has been on the settlement of land claims.

If strategic plan objectives, including SMZ objectives, are implemented, planning decisions have the potential to significantly reduce land use conflicts and to provide increased land use certainty. Considerable efforts are already underway with respect to plan implementation. The plans need to be effectively implemented if the benefits the plans are intended to achieve are to materialize in the long-run.

Although we are close to having completed a first round of strategic land use plans for the whole province, the job of land use planning in BC is far from over. Effective plan implementation is key to honouring the considerable efforts made towards plan development.

There are potential opportunities to gradually re-direct existing budgets which have been used for plan development towards plan implementation, without having to earmark new incremental budgets for these purposes.

If strategic plan objectives, including SMZ objectives, are implemented, planning decisions have the potential to significantly reduce land use conflicts and to provide increased land use certainty

Effective plan implementation is key to honouring the considerable efforts made towards plan development.

Planning tables have developed plans as "integrated packages" of resource management zone objectives and, in many cases, included economic strategies. Plan implementation actions must respect this integrated intent. Implementing plans in their totality will help ensure that SMZ objectives are achieved.

The SMZ Working Group was asked to identify ways to improve delivery of SMZ objectives. Implementing SMZ objectives is not easily separated from implementing other components of land use plans. Therefore, although the Working Group's recommendations are directed towards SMZ delivery, because of the group's mandate, most recommendations apply equally to other strategic land use plan zones and objectives.

The SMZ Working Group acknowledges the important existing efforts by agency staff and stakeholders to implement land use plans including SMZ objectives. The Working Group also recognizes that improvements can be made.

The Working Group provides the following recommendations to government for improving the implementation of SMZ objectives. The recommendations are also intended to support field staff and stakeholders towards improved implementation of SMZ objectives. The background, rationale and fuller explanation of these recommendations is provided in the body of the report.

The following recommendations are presented in no particular order.

Recommendation 1:

Encourage Innovative Approaches To Implementing SMZ Objectives

Support and encourage innovative approaches for achieving SMZ objectives such as alternative operational practices and unique ways to build local partnerships.

Key approaches for delivering this recommendation include:

- **SMZ field projects**: continuing and expanding a variety of pilots and trials to meet SMZ objectives such as the SMZ "field projects" undertaken as part of this project.
- **Sharing Results**: developing an integrated system for reporting and sharing results from various progressive resource management initiatives (e.g., the SMZ project, Enhanced Forest Management Pilot Projects, Innovative Forest Practices Agreements, results-based Forest Practices Code pilots, forest certification; community forests such as those testing ecoforestry concepts, etc.). LUCO, or another identified lead agency, should be assigned this task.
- **Building partnerships**: investigating innovative partnerships for funding and cooperating in initiatives for implementing SMZ objectives.
- **Improving coordination**: experimenting with alternative coordinating mechanisms for SMZ implementation.
- **Assessing benefits and costs**: assessing the full range of costs and benefits associated with innovative approaches, and using this information for adaptive management purposes.

Recommendation 2:

Undertake Local Planning In Selected Areas

Approved strategic plans identify some SMZs as needing further local planning to resolve or clarify key issues. It is important that local planning be undertaken in selected areas to address these issues.

Key approaches for delivering this recommendation include:

- **Prioritise efforts**: prepare a list of priority areas and timing for expanded landscape unit and other local planning based on need and available support resources. This could be done by IAMCs in consultation with First Nations, key agencies and stakeholders.
- **Landscape unit planning**: in selected areas, expand the current focus of landscape unit planning (i.e. retention of old growth and wildlife trees) in the short-term to include other key issues / values, as needed to address key SMZ objectives.
- **Other planning processes**: support other local planning efforts particularly where identified in the approved land use plan as key to implementing SMZ objectives (e.g. coordinated access planning; recreation / tourism planning; pre-tenure planning for oil and gas; community watershed planning).
- **Inventory and research**: ensure inventory and analysis work needed to support local planning efforts is undertaken, particularly where specifically identified by stakeholders in approved plans as key to plan implementation.

Recommendation 3:

Utilize Legal Tools And Review Policy As Required

An important implementation step identified in approved strategic plans is to establish appropriate legal tools, when needed, to implement aspects of the plan. Several planning tables have also noted the need to review provincial policy barriers to effective plan implementation.

Key approaches for delivering this recommendation include:

- **Legal tools**: utilize legal tools under the Forest Practices Code (e.g., higher level plans, wildlife habitat areas, scenic areas, etc.) as well as "non-Code" tools (e.g., wildlife management areas, forest land reserve, etc.) in a timely manner as needed to implement SMZ objectives.
- **Policy considerations**: review and amend, where appropriate and in the context of the entire land use plan, policy impediments to implementing SMZ objectives (e.g., utilization standards, timber pricing, access management).

Recommendation 4:

Monitor The Achievement Of SMZ Objectives

All strategic plans identify the need for plan monitoring. Yet little monitoring work is in fact taking place. There is concern that this key aspect of plan implementation may not be adequately resourced and, as a result, we will not be able to monitor delivery of SMZ objectives and strategies - and, more importantly, to learn and adapt accordingly.

Key approaches for delivering this recommendation include:

- **Monitor plans**: as part of strategic land use plan monitoring, monitor the extent to which SMZ objectives are being achieved (effectiveness monitoring) and plan strategies are being undertaken (implementation monitoring), and consequently adapt management practices accordingly in a cycle of continuous improvement.
- **Develop schedules**: as part of the implementation plan (or work plan) for each completed land use plan, develop a schedule for implementation and effectiveness monitoring. Government needs to demonstrate strong support in its budget and resource allocations for both implementation plans and monitoring.

Introduction

Background

Nearly all of BC's strategic plans[1] identify "special management zones" (SMZs). Strategic plans include both regional plans and sub-regional Land and Resource Management Plans (LRMPs). The general expectation in SMZs is that resource development activities will be managed to minimize the risk of undesirable impacts on the important or sensitive resource attributes that are identified for each SMZ.

The general expectation in SMZs is that resource development activities will be managed to minimize the risk of undesirable impacts on the important or sensitive resource attributes identified for each SMZ.

Concerns have been raised about SMZ implementation. Conservation interests are concerned that resource values in SMZs are being insufficiently recognized and protected, and that management practices in SMZs do not differ substantially from practices applied in other plan zones where resource development occurs (e.g. Cooperman, 1998). Industrial interests are concerned that SMZ designation has led, or could lead, to additional cost, uncertainty and delays in regulatory approvals. The mining sector is particularly concerned that the "label" SMZ may be a deterrent to mineral investment.

To address these concerns, following the advice of an initial stakeholder workshop, government established a SMZ Working Group in 1998. The Working Group comprises individuals with a variety of interests and perspectives both outside of and within government (see Appendix 1 for membership), with a mandate to make recommendations on ways to improve the implementation of SMZ objectives. Further background on the project's origins are contained in two 1998 documents: a *SMZ Information Report* and an *SMZ Action Plan*. (Also see Appendix 3 for the terms of reference for the project).

The Working Group was chaired by the Land Use Coordination Office (LUCO) and supported with funding from Forest Renewal BC (FRBC). The Working Group formed three subcommittees to investigate three SMZ-related subjects: (1) the status of SMZs, (2) planning, referral and approval in SMZs, and (3) economic development activities in SMZs. To foster communication, a website was created where minutes of working group meetings and documents about the project, including subcommittee efforts, were stored and made available for public review (see www.luco.gov.bc.ca/smz/home.htm).

Incorporating the results of the subcommittee efforts, the Working Group prepared a draft report with proposed recommendations in March 2000. Several communication documents were also prepared on various aspects of the project. All of this material was placed on the project website, widely circulated and discussed at a second stakeholder workshop held in June 2000.

The bulk of the funding from FRBC was directed at supporting "field projects" to assist agency staff and stakeholders in the field and to foster learning from their efforts. This work is on-going and a status report will be provided as a separate document expected March 2001.

This final report describes the findings of the SMZ Working Group considering all of the above efforts particularly as they relate to the report's recommendations. The Working Group

[1] The term "strategic plan" is used throughout this report to refer to approved Strategic Land Use Plans (SLUPs), which include Land and Resource Management Plans (LRMPs) and regional plans.

acknowledges and respects that there are different views about how well SMZs are being implemented in various land use plans. The Working Group's focus has been towards the future and improving SMZ implementation.

Report Purpose and Scope

This report is provided to the Deputy Ministers of Forests; Environment, Lands and Parks; and Energy and Mines, as per the SMZ Working Group's terms of reference (see Appendix 3).

The Working Group acknowledges the considerable efforts by agency staff and stakeholders to deliver SMZ objectives yet also recognizes efforts can be improved. The thrust of this report is to identify ways to improve SMZ implementation, within the existing framework of laws, programs and budgets, governing land and resource management in BC. No new land / resource management programs or mechanisms are being proposed for SMZ implementation; however, changes to the emphasis and priority that existing programs and mechanisms receive from government are proposed.

The thrust of this report is to identify ways to improve SMZ implementation, within the existing framework of laws, programs and budgets, governing land and resource management in BC.

This report is also intended to advise agency field staff and other parties with an interest or involvement in ongoing implementation of strategic plans on options for achieving SMZ objectives.

The advice contained in this report applies to the existing inventory of approved SMZs, as well as future SMZs that may be established by government as a consequence of strategic plan approvals.

As mentioned, this final report describes the findings of the Working Group with focus on how they relate to and support the Group's recommendations. The Working Group has produced other documents detailing the findings of its three subcommittees and will be preparing separate documents on:

- Case examples of SMZ implementation
- Progress and results of funded SMZ "field projects."

This report and other documents from the Working Group are available on the LUCO SMZ Project website: http://www.luco.gov.bc.ca/smz/home.htm

Description of SMZs

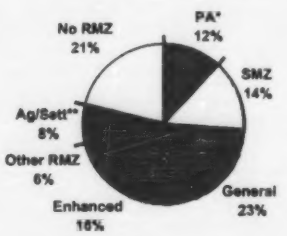
SMZs in Relation to Other Zone Categories

BC's strategic plans (i.e., regional and sub-regional [LRMP] plans) recognize and apply two basic Crown land use categories:

- **protected areas** (PA) where resource development activities are not allowed, and
- **integrated resource management areas** (SMZ, General, Enhanced, Other RMZ) where resource development is allowed, subject to guidelines and measures that address the management and protection of specific resource values.

In addition, Crown and private lands that support agriculture or settlement are

Status of Resource Management Zones in BC (2000)



*PA - Protected Areas

**Ag/Sett - Agriculture / Settlement zone

identified in strategic plans.

Within integrated resource management areas, the resource management zones (RMZs) that are commonly recognized in strategic plans include 'special', 'general', and 'enhanced' (see the table below). Two recently completed LRMPs have not used these categories; they represent the 6% of the province in "other RMZ" as shown in the pie chart above.

Special management zones (SMZs) are intended to cover areas where there are 'development-sensitive' resources, such as habitat, recreation, scenery, cultural heritage, and community watershed values. SMZ's have been applied over areas that:

- contain a regionally important environmental value, as noted above, or significant combinations of such values,
- have received past recognition of their sensitivity and significance – such as caribou habitats that have been subject to caribou management guidelines, or domestic water supply areas that were designated as community watersheds,
- are largely un-roaded and undeveloped, often near protected areas, thereby providing important backcountry values, and
- provide opportunities for inter- and intra-regional movement corridors designed to lessen potential biodiversity impacts associated with ecosystem fragmentation and isolation (i.e. encourage regional and landscape-level connectivity).

Resource Management Zones within the Integrated Resource Management Areas

RMZs within IRM Category	Description	Examples of Legal Tools which may be considered
Enhanced* Resource Management Zone	• lands to be managed with emphasis on intensive development of timber resources (and in one instance, coal). • predominantly Crown lands, but might also include private lands in tree farm licences.	• Forest Land Reserve • RMZ Higher Level Plan (established under FPC) may be needed
General* Resource Management Zone	• lands to be managed for a wide array of resource values • predominantly Crown lands, but might also include private lands in tree farm licences.	• Forest Land Reserve • RMZ Higher Level Plan normally not needed
Special* Resource Management Zone	• Crown lands to be managed with emphasis on conserving one or more sensitive resource values such as habitat, recreation, tourism, scenery, and community watersheds • Resource development activities allowed (e.g. all SMZs enable mineral development and nearly all enable forest development) • areas are frequently a high priority for more detailed local planning	• Forest Land Reserve • RMZ Higher Level Plan (established under FPC) may be needed • Community Watershed • Special legislation for Muskwa-Kechika area

* Some land use plans have used other terms to describe these RMZs (e.g., the Cariboo-Chilcotin Land Use Plan used "Integrated Resource Development Zone" instead of General Resource Management Zone)

The previous table describes various resource management zones within the broader IRM category as they have been developed through provincial policy. This policy advice has since been adapted for use in individual strategic planning areas.

Government's initial use of SMZs occurred as part of the 1993 Clayoquot Sound Land Use Decision.

Government's initial use of SMZs occurred as part of the 1993 Clayoquot Sound Land Use Decision. In 1994, the Vancouver Island Land Use Plan recognized "low intensity areas" that are now called SMZs. The Cariboo-Chilcotin Land Use Plan (CCLUP) identified "special resource development zones," indicating that the areas contain sensitive or significant resource values, but are nonetheless available for appropriate types of resource development. CCLUP includes various resource targets including timber access and wildlife targets. SMZs were also identified in the Kootenay-Boundary Land Use Plan (KBLUP). The subsequent KBLUP Implementation Strategy, however, focuses more on guidelines for maintaining sensitive values wherever they occur in the region regardless of whether the area is a SMZ or not.

Although initial provincial LRMP advice suggested three sub-categories of SMZs (habitat; recreation/tourism/scenery; and community watershed), not all LRMP processes have followed that system, or have adapted it to local circumstances. For example, the Bulkley LRMP identifies SMZ categories based on timber harvesting opportunity. The Kispiox LRMP defines certain SMZs that are deferred from timber harvesting until more resource information is gathered. The Dawson Creek LRMP created a wildlife-coalfield SMZ to promote conservation of critical wildlife habitat and the development of proven coal resources. In the Lower Mainland, SMZs were established as a result of a special planning process for spotted owl conservation. In the Fort Nelson and Fort St. John LRMPs, the SMZ category occupies a vast area of relatively undeveloped wilderness subject to special legislation (*Muskwa-Kechika Management Area Act*) that requires certain types of local plans prior to forest development or the issuance of new tenures for commercial recreation or oil and gas.

The IRM zones normally used in strategic plans are being critically evaluated by some recent and on-going planning tables. On one hand, zoning names help convey a concept of broad intent; on the other hand, the names can be considered unneeded "tags" that detract from the main intent — which is to provide clear objectives and strategies for various resource management zones. "Enhanced" or "special" management zone labels were not used in the Cassiar Iskut-Stikine LRMP or the Okanagan - Shuswap LRMP.

The SMZ Working Group feels that developing clear resource management zone objectives is far more important than labelling resource management zones as "special" or "enhanced," and is of the view that planning tables should have discretion on whether or not to use zone labels.

Not all strategic plans follow the same approach for a variety of reasons. British Columbia has unique plans for unique areas that reflect the diverse characteristics of the people involved at the planning tables and the unique values within their plan areas. The variety of approaches can provide beneficial opportunities for learning as strategic planning and implementation in BC continues to mature and evolve.

The SMZ Working Group supports the principle that approved guidelines for protecting sensitive resource values should be applied, regardless of zone boundaries and labels.

Resource management zones are often mapped in strategic plans to include large geographic units, for example, watersheds. The "special" values that may have prompted the SMZ label may occur in portions of the geographic unit (e.g. caribou winter range) for which special resource guidelines apply. Thus, not all of the SMZ may be subject to these guidelines. Similarly, pockets of "special"

values occur in zones that have been labelled as "general" or "enhanced". The SMZ Working Group supports the principle that approved guidelines for protecting sensitive resource values should be applied, regardless of zone boundaries and labels.

SMZ Status

As of December 2000, SMZs have been established for about 14% of the provincial land base. For areas with approved strategic plans, the SMZ category covers approximately 20% of the land base. Appendix 2 shows the distribution of resource management zones, including SMZs, by ecoprovince and biogeoclimatic zone.

The following table indicates the number of SMZs by region as of December, 2000. The table however excludes SMZs in the Revelstoke portion of the KBLUP since current RMZs may change pending government approval of an advisory group report.

IAMC Region	Land Use Decision	Number of SMZs	SMZ Land Area (ha)
Cariboo	• regional plan (CCLUP)	16	2,143,652
Vancouver Island	• regional plan (VILUP)	22	268,362
Kootenay	• regional plan (KBLUP)	50*	1,287,042
Omineca-Peace	• LRMPs (7)	75	7,949,658
Prince Rupert	• LRMPs (3)	70	686,799
Kamloops	• LRMP (1)	40**	523,996
Lower Mainland	• spotted owl mgt plan (SOMP)	18***	223,713
Totals		**289**	**13,083,222**

** not including Revelstoke area **updated *** not including 3 in parks*

The table below provides a summary of resources, resource potential and activities in SMZs based on a 1999 survey of approved land use plans as requested by the economic subcommittee of the Working Group:

Resources	Economic Resources Activity and Potential
Biodiversity	• In most plans, SMZs have a greater proportion of "high and intermediate" Biodiversity Emphasis Options (BEOs). Consequently, maintenance of biodiversity is considered to be "at less risk" because a larger percentage of old forests should be retained. Most BEOs are currently draft with approval expected though landscape unit planning. • Biodiversity elements other than retention of old forests are important in many SMZs. For example, maintaining regional and local connectivity or distribution of other seral forest conditions.
Fish and Wildlife Habitat	• In most plans, the amount of high value habitat in SMZs is proportionally greater for provincially significant species such as caribou, grizzly bears and bull trout. • For example, although SMZs represent about 20% of the province with completed land use plans, they include just over 40% of areas with high and very high caribou habitat. • For LRMPs in the Omineca-Peace that have reported distribution of grizzly bear habitat by resource management zone, just over 40% of high and moderate value habitat is in SMZs (SMZs also represent about 20% of these LRMPs by area).

Resources	Economic Resources, Activity and Potential
Water	• Most community watersheds under the Forest Practices Code are included as SMZs • For example, all community watersheds in the Kamloops and Kispiox LRMPs are in SMZs. • SMZs also capture important domestic water use areas not designated as a community watershed under the Code.
Forestry	• 90% of SMZs contain timber harvesting land base (THLB). • 15% of the THLB within approved plans is in SMZs. • For SMZs with THLB, 68% have experienced recent harvesting. For the 77 SMZs with no recent harvesting, some activity is expected over the next 5 years in 39 SMZs. • For SMZs with either recent harvesting or expected harvesting, an increase in harvesting is expected in 43% of the SMZs (88). • No appreciable change in harvest levels is expected in 49% (102) of SMZs, and a decrease is expected in 8% (16 SMZs) • No harvesting is planned in the next 5 years for 16% of SMZs. • Timber access targets are in place in 16 SMZs in the Cariboo-Chilcotin as part of the higher level plan. • Harvesting is not permitted in 7 SMZs in Bulkley and Prince George LRMPs. • The Main silviculture system used and intended for SMZs with recent or expected harvesting (76%) is clear cut with internal reserves (wildlife tree patches). • Alternative harvesting or modified systems are used at varying levels in about 50% of SMZs.
Road Access	• For SMZs with THLB (244) road access is relatively well developed in 62% of SMZs; limited for 17% and nil (unroaded) for 21% (52 SMZs).
Range Use	• Cattle grazing occurs in portions of nearly 20% of SMZs (mainly Kamloops and Cariboo). • No change is forecast in grazing levels over next 5 yrs. • For most SMZs, remoteness and/or lack of forage restricts range use and limits potential.
Mineral Development	• 55% (148) of SMZs have moderate to high mineral potential. Most of these have experienced past exploration activity. • There is some level of mineral activity for about 70% (56) of southern SMZs with high to moderate mineral potential, whereas the figure for northern SMZs is 13%.
Oil and Gas Development	• Oil and gas potential is moderate to high in 25 SMZs (including 10 in the Muskwa-Kechika) and low to moderate in 8 SMZs. • 16 SMZs have exploration and development activity • An increase in activity is expected in 19 of the SMZs over next 5 years.
Coal Development	• The Telkwa coal mine proposal includes portions of 2 SMZs in the Bulkley LRMP area. • 5 SMZs in the Dawson Creek LRMP have coal potential, and one was specifically identified as a "wildlife-coalfield" SMZ. In this plan area there has been no coal exploration in the recent past and none expected over the next 5 years.
Tourism and Recreation	• Public and commercial recreation use is high to moderate in about 66% of SMZs. • Snowmobiling occurs in nearly 50% of SMZs and backcountry and cross-country skiing occurs in nearly 20% of SMZs. Commercial heli-skiing occurs in the Kootenays and Kamloops and Robson Valley LRMPs. • About 50% of SMZs are expecting increases in public and or commercial recreation over the next 5 years. No decreases in use are expected. • SMZs sometimes capture scenic areas that provide the important visual backdrop for particularly important tourism and recreation use areas. • SMZs often provide important staging areas for use in adjacent protected areas.

Resources	Economic Resources Activity and Potential
Botanical Forest Products	• Use of botanical forest products in SMZs is not well known since the activity is not currently regulated. • Two SMZs are notable for the variety of botanicals that are harvested: Quadra Island SMZ in Vancouver Island Land Use Plan, and Upper Blackwater SMZ in Vanderhoof LRMP. • Botanical use is linked to provision of access.

SMZ Objectives and Strategies

SMZ objectives and strategies generally emphasize the priority of maintaining the quality and quantity of the conservation values located in the SMZs. Resource development activities such as road building, timber harvesting, mineral and petroleum and natural gas exploration and development, grazing, and tourism are nearly always permitted in SMZs, subject to measures to minimize or mitigate impacts from those uses on SMZ resources.

Resource development activities are nearly always permitted in SMZs, subject to measures to minimize, or mitigate impacts from those uses on SMZ resources.

Examples of strategic plan objectives and strategies for achieving this intent include provisions for:

- limiting the type or extent of resource development activities in the vicinity of identified resource values (e.g., by defining guidelines for maintaining specified levels of forest cover),
- joint approval of forest development plans between the Ministry of Forests and the Ministry of Environment, Lands and Parks,
- broad referral and/or increased opportunities for agency and public involvement in subsequent resource planning and decision-making; for example referral to the Ministry of Small Business, Tourism and Culture where tourism / scenic values are significant,
- more detailed planning for the SMZ, or for particular resources located in the SMZ (e.g., resource management plan prepared for each spotted owl SMZ),
- acquiring additional information about the quantity and quality of particular resources through resource inventories or scientific studies (e.g., caribou habitat, grizzly bear inventories),
- adopting higher standards of access planning and management
- adopting legally enforceable land use designations over SMZs or portions of SMZs, such as establishing higher level plans under the Forest Practices Code, or wildlife management areas under the *Wildlife Act*.
- identifying resource use / access targets, or guides to manage timber supply impacts.

Recommendation 1

Encourage Innovative Approaches to Implementing SMZ Objectives

Support and encourage innovative approaches for achieving SMZ objectives such as alternative operational practices and unique ways to build local partnerships.

Evaluating resource management action in a SMZ, and trying to determine whether or not it is "special," should not be the focus. "Special management" (in the context of implementing SMZs) comprises measures needed to meet the objectives for the area. In some cases, this may not differ greatly from practices in other resource management zones, particularly where similar values are being managed. The success of implementing SMZs should be considered in relation to the area-specific SMZ objectives. Innovative approaches are not always needed. However sometimes they are; or, at least, should be considered.

SMZ strategies in approved strategic plans sometimes recommend specific innovative measures as suggested "best practices" for achieving SMZ objectives. For example, alternative harvesting systems, such as partial harvest, may be recommended in order to deliver the scenic or wildlife values in some SMZs.

SMZ strategies in approved strategic plans sometimes recommend specific innovative measures as suggested "best practices" for achieving SMZ objectives.

The tag "SMZ," as discussed, does categorize or "label" an area. This may be considered "unwelcome" by some, as it is may be perceived to be an impediment to resource development. The SMZ label, however, can be seen as a strong positive incentive that challenges agencies and stakeholders to provide the best stewardship possible for the resource values found within an area. SMZs "spotlight" certain areas in ways that can encourage voluntary innovative approaches that advance resource stewardship practices and provide the feedback and learning needed for adaptive management.

The Working Group encourages innovative approaches where they are needed to achieve SMZ objectives or help advance the resource management knowledge-base - particularly as they relate to on-the-ground activities. Some ideas on how this can be achieved are described below.

SMZ Field Projects

There are a variety of field projects and pilots already taking place in SMZs throughout the province. Some of these projects were funded by the Working Group as part of the SMZ Project. Other field projects are taking place in SMZs as a result of other programs such as the Enhanced Forest Management Pilot Projects (EFMPPs), Innovative Forest Practices Agreements (IFPAs), and research projects that address values commonly found in SMZs such as caribou and grizzly bears.

All of these projects add to the knowledge-base and therefore contribute to making resource management in SMZs both cost-effective and environmentally-effective. Although considerable effort have been made in this regard, the SMZ Working Group feels these efforts need to be continued and expanded.

Some examples of suitable subject areas that were identified for field projects, based on an investigation of SMZ economic development activities and opportunities, include:

- **partial harvesting**: although several partial harvesting trials exist, further exploration of partial harvesting is warranted in SMZs to address values such as key scenic areas. Cost-effectiveness, ecological appropriateness and ability to meet SMZ objectives should be assessed in partial harvesting system trials in SMZs.
- **cluster harvesting**: further investigation is needed to see how well the concept of 'cluster harvesting' contributes to biodiversity, wildlife and recreation values. Cluster harvesting is where cutting is concentrated in a sub-drainage and harvesting occurs over a relatively short period, followed by road deactivation and inactivity for a long period of time.
- **resource guidelines**: the effectiveness of resource guidelines that commonly apply in SMZs should be compared with alternative approaches using comparative analysis showing benefits and costs. For example, some guidelines could lead to fuel build-ups that inadvertently set up the potential for catastrophic fires and this risk should be assessed and alternative approaches examined.
- **access**: many strategic plans cite the need for access management strategies in SMZs, with the intent of coordinating the access needs of various industrial users, addressing the access preferences of recreational users, meeting wildlife management needs, and controlling the introduction of foreign plants that is often associated with new access development. Further effort is needed to explore innovative approaches to developing and implementing access management strategies that involve stakeholders.
- **spatial modelling**: throughout the landscape, including SMZs, these models can identify the specific location of important resource values in relation to potential road access and forest harvesting development over time, so that strategic plan implementation can be viewed both spatially and temporally. There are a number of models available and further testing is encouraged so that this tool can be more effectively employed to improve the understanding of resource interactions over time and thereby assist delivery of SMZ objectives.

Sharing Results

A wide array of initiatives exist that can promote progressive resource management and can provide a learning-base for improving practices throughout the land base including SMZs where they may be particularly needed. Linking effectively with other initiatives has been a major focus of Working Group discussions and has led to the preparation of the report, *Implementing SMZs: Overview of Linkages with Other Initiatives* (available on the LUCO website at http://www.luco.gov.bc.ca/smz/reports.htm).

Examples of key initiatives designed to promote progressive management practices include:

1. The Special Management Zone Project with its field projects
2. Enhanced Forest Management Pilot Projects (EFMPPs)
3. Innovative Forest Practices Agreements (IFPAs)
4. Results-based Forest Practices Code Pilot Projects
5. Forest Certification schemes including:
   a. International Organization for Standardization (ISO)
   b. Canadian Standards Association (CSA)
   c. Forest Stewardship Council (FSC)
6. Community forests; such as those testing ecoforestry concepts.

A forum on forest certification was recently sponsored by The Ecoforestry Institute, with major funding support from FRBC and the Vancouver Foundation, along with several other sponsors. The forum proceedings (Senez 2000) describes the various schemes and recent experiences with their use in BC.

All of the above initiatives have positive features, including communication strategies that promote the sharing of knowledge. However, there is no formal integrated system for reporting and sharing results between these various initiatives, as the SMZ Working Group feels there should be.

A formal integrated system is needed for reporting and sharing results between various initiatives.

LUCO, or another lead agency, should coordinate this.

These various initiatives, and others, have the opportunity to encourage testing of practices that are responsive to sensitive values found within SMZs or other RMZs. In addition, further definition of management standards for "enhanced" resource management zones may actually contribute to improved implementation of SMZ objectives by clarifying the respective roles of "special" and "enhanced" in the overall zoning scheme.

LUCO, or another identified lead agency, should be charged with the responsibility of coordinating communication efforts.

Building Partnerships

Strategic plans are developed by the diverse interests represented at planning tables. Each group has invested considerable time and, in some cases, the funds necessary to partner in the development of a plan. The real strength of these plans, particularly where consensus has been reached, is the sense of ownership by the diverse interests.

Implementation of approved strategic plans is the shared responsibility of the provincial government in partnership with other orders of government (local and federal), communities, tenure holders, stakeholder groups and First Nations. Delivering SMZ objectives is a key part of plan implementation.

Several approved plans have a multi-stakeholder committee that oversees plan implementation. This type of forum should be encouraged since an on-going sharing of plan responsibilities is required if SMZ objectives are to be achieved effectively and efficiently.

An on-going sharing of strategic plan responsibilities is required if SMZ objectives are to be achieved effectively and efficiently.

FRBC's Crown Land Use Planning Enhancement (CLUPE) program has greatly assisted plan development and implementation. Maintaining this program is viewed as vital to the continued success of strategic planning in the province.

The SMZ Working Group believes it is important to strengthen existing partnerships that already exist as well as to investigate other innovative partnerships for funding and cooperating in initiatives that promote the implementation of SMZ objectives.

Some areas worth exploring include building or strengthening partnerships between:

1. **Industry**, through FRBC and other mechanisms, to further promote innovative operational field projects in SMZs;

2. **conservation, recreation and tourism organizations** to explore effective ways to reconcile sometimes competing interests in tourism development, motorized and non-motorized recreation and wildlife protection in backcountry-oriented SMZs;
3. **local government** who may be interested in profiling tourism and recreation values associated with SMZs as part of their efforts towards rural economic diversification;
4. **First Nations** to get them more involved in SMZ implementation, where they have the interest and the capacity to do so.
5. **the federal government** to get them more involved in making approved plans a success. For example, key mountain caribou habitat is often captured in SMZs and there is federal interest to ensure recovery of threatened species. This may require local planning to address issues like recreational access in addition to traditional issues like habitat and predation; and,
6. **provincial resource agencies** so that they work more closely together to corporately resolve SMZ implementation issues of mutual concern.

Improving Coordination

In protected areas, a single agency has full accountability for delivering the objectives for each area (e.g., BC Parks for provincial parks and Parks Canada for national park areas).

In the case of integrated resource management zones, that accountability is dispersed amongst several line agencies. The Ministry of Forests, however, has statutory responsibility (through section 4(c) of the *Ministry of Forests Act*) for delivering values under its mandate, namely timber, range and public recreation, in a manner that integrates and coordinates with values under the mandate of other line agencies or Crown corporations (e.g., wildlife, fisheries, water).

Most of the development occurring in general and enhanced resource management zones takes place because of timber production. Locally, there may be mining, tourism or other development activity, but generally speaking, the main activity influencing habitat change, tourism and recreation settings, and access is forest development.

This is also true for most SMZs, but not all. Some of the larger SMZs found in northern BC (within the Omineca-Peace and Prince Rupert IAMC regions) are remote backcountry areas with either little or no timber harvesting land base, or few pressures expected in terms of forest development for several years to come.

The main focus for near-term development in some of these larger SMZs may be oil and gas development, tourism and commercial recreation development, or mineral development. The main concerns about these activities often involve environmental values such as wildlife (as opposed to timber or range concerns).

The SMZ Working Group encourages continued efforts and resources to strengthen the role of IAMCs in improving coordination of plan implementation, including delivery of SMZ objectives.

In such cases it may be unclear which agency should provide leadership and help "champion" the successful delivery of SMZ economic and conservation objectives. A "champion" or lead agency does not assume additional statutory responsibilities, but does foster and promote agencies to work together with stakeholders to deliver SMZ objectives effectively and efficiently.

For example, the lead agency might coordinate other agencies and stakeholders in local planning or interagency research efforts.

Strategic plan implementation, in terms of statutory responsibilities, rests with various line agencies. The Inter-Agency Management Committees (IAMCs) are the primary vehicle for achieving inter-agency cooperation at the regional level, and they play a central role in plan implementation. This role can be difficult at times because IAMCs are comprised of agency representatives whose prime accountability is to their mandated programs and legislation.

The SMZ Working Group does not propose changing existing statutory decision-making responsibility. The Working Group does, however, encourage continued efforts and resources to help strengthen the role of IAMCs in improving coordination of plan implementation, including delivery of SMZ objectives.

Assessing Benefits and Costs

Following the principles of adaptive management, innovative approaches to delivering SMZ objectives are encouraged by the SMZ Working Group. Assessing benefits and costs will help ensure that innovative practices address environmental objectives and are cost-effective.

The Working Group recommends that the full range of benefits and costs associated with innovative approaches to delivering SMZ objectives be assessed, and that this information be used to better deliver SMZ objectives.

Benefit / cost assessments are an important consideration in determining the effectiveness of innovative practices in SMZs.

Recommendation 2

Undertake Local Planning in Selected Areas

Approved strategic plans identify some SMZs as needing further local planning to resolve or clarify key issues.

It is important that local planning be undertaken in selected areas to address these issues.

The amount of detailed resource management direction that can be reasonably provided in strategic plans is limited by the scope and scale of this broad planning level. Time and resource constraints on the planning process can also limit the amount of management guidance that planning tables develop. Some issues remain either unresolved or specifically un-addressed, often with a note urging resolution through more detailed local planning. Consequently, strategic plans often call for subsequent, more detailed local planning as a primary strategy for clarifying SMZ objectives and providing improved guidance for resource development activity.

More detailed local plans for smaller areas, based on more intensive resource inventories, larger scale mapping and more rigorous technical analyses, provide the ability to more accurately locate significant resource values and to define specific prescriptions for managing those values[2]. In this way, generally worded SMZ objectives can be translated into more specific and tangible management prescriptions. The following table provides an example of how SMZ objectives from a strategic plan might be 'stepped down' via a more detailed planning process to provide specific management direction that can be implemented at the operational planning and approvals stage.

Translating a SMZ Objective / Strategy Through More Detailed Planning

SMZ Objective:

- Retain high value grizzly bear habitat

SMZ Strategy:

- Minimise forestry activities, including road building, in the following key areas: seepage areas, riparian floodplains, meadows, fens, wetlands, deciduous south-facing slopes, and avalanche chutes.

Local Plan Objective:

- Protect high value (class 1 and 2) grizzly bear habitat in areas of known high and moderate grizzly bear density, as shown in map 6.

[2] More detailed, prescriptive planning is not always possible for certain resources, given their nature and the manner in which they are normally developed. Hidden subsurface resources are a prime example because they cannot be easily inventoried and planned. Also, development activity is strongly driven by external, international factors, such as commodity prices. Therefore, management approaches must be flexible and adaptive to accommodate new information on mineral or oil and gas discoveries. Implementing best management practices (e.g., Mineral Exploration Code) and maintaining flexibility in approaches to managing for other resource values is key. As a result, government maintains a policy of 100 per cent access on all non-protected Crown lands in BC, including SMZs, for mineral exploration, subject to application of the Mineral Exploration Code.

Local Plan Strategies:

- Where areas of operable timber and class 1 and 2 grizzly bear habitat (seepage areas, riparian floodplains, meadows, fens, wetlands, deciduous south-facing slopes, and avalanche chutes) coincide, apply the following guidelines:
  - Locate roads at least 150 m from grizzly bear habitat
  - Retain areas of mature forest cover of approximately 100 m in width adjacent to class 1 and 2 grizzly bear habitat to provide for bedding and security cover. The degree of cover will vary with the density of coniferous trees in forested areas; and
  - Use non-clearcut systems adjacent to areas of mature forest cover retained for grizzly bear use.

Example taken from *Guide to Writing Resource Objectives and Strategies.* MOF, 1998.

Special Management Zones are not environmental or economic islands; the planning and management of SMZs needs to take into consideration their relationship with the rest of the landscape. Similarly, planning and management of lands adjacent to SMZs needs to be sympathetic to SMZ values if these values are to be sustained.

Local-level planning can provide an appropriate forum to address SMZ objectives that are common with those of adjacent lands (e.g., protected area or enhanced zone). One example is the planning currently underway for the Muskwa-Kechika Management Area, where there are common objectives for SMZs and adjacent protected areas (e.g., maintaining ecological, recreational and cultural values). Another example is the subregional planning for the Cariboo-Chilcotin Land Use Plan, where timber and non-timber targets are being refined for all RMZs, including SMZs.

Prioritise Efforts

Funding decisions always come down to a question of setting priorities. Given the shared resources needed to undertake local planning the SMZ Working Group recommends that a list of priority areas be prepared. This list should be based on need (see the criteria below) and availability of support resources. Prioritisation could be undertaken by IAMCs in consultation with First Nations and key agencies and stakeholders needed to support these efforts.

It is recommended that a list of priority SMZ areas be prepared by IAMCs, based on local planning needs.

High priority areas for local planning should be identified where:

- Planning tables had the clear expectation when they developed their strategic plan that some key SMZ objectives (or issues) would be addressed through local planning in order to guide operational planning and field practices;
- Operational planning and resource development in the SMZ is envisioned in the short term (within five years); and,
- Generalized SMZ objectives in strategic plans need to be translated into clearer objectives.

Local planning tools include landscape unit planning and a variety of other planning processes.

Landscape Unit Planning

The local planning process with the greatest potential, currently, for addressing SMZ objectives is the 'landscape unit' planning program under the Forest Practices Code. This potential is due to the fact that:

- this planning level is conducted at a local
- scale where more technical information and analyses enable the development of substantive and prescriptive resource management direction;
- government has committed to a province-wide program for landscape unit planning and has recently produced administrative supports, such as a landscape unit planning guide and associated training, to assist program delivery;
- landscape unit objectives can be made legally enforceable through designation as 'higher level plans' under the Forest Practices Code[3]; and,
- the current focus of landscape unit planning on biodiversity addresses a key value common to most SMZs.

Landscape unit planning is potentially one of the most effective tools for achieving SMZ objectives.

The SMZ Working Group notes, however, that the potential to address other SMZ objectives through the landscape unit planning program is limited by the constraint that government has placed on the current scope of the program. The direction is that, in its initial three years of implementation, landscape unit planning will focus on developing objectives and strategies for biodiversity maintenance. Specifically, the process will normally be limited to developing resource objectives and strategies for 'old growth management areas' and 'wildlife trees' as two key biodiversity elements (see glossary).

The other four biodiversity elements that are not part of the initial focus for Landscape Unit Planning are:

- Species composition
- Temporal and spatial distribution of cutblocks (patch size)
- Seral stage distribution
- Landscape connectivity

Government has acknowledged that certain landscape unit planning processes could be expanded in scope to deal with additional issues (e.g., provide refined management direction for other SMZ values such as water, recreation or other biodiversity elements), provided that this expansion is necessary to address higher level plan resource management zone objectives or does not impede the ability to develop province-wide landscape unit objectives for the two priority biodiversity elements.

The SMZ Working Group supports the priority of developing biodiversity objectives for landscape units, given the major contribution that this will make to SMZ implementation. The Working Group, however, also sees a need for expanding the current scope of landscape unit planning processes in a number of situations.

The Working Group sees a need for expanding the current scope of landscape unit planning processes in a number of situations.

The SMZ Working Group believes that expanded landscape unit planning can be achieved with focused stakeholder consultation, given the already extensive stakeholder involvement in strategic planning

[3] Establishing landscape unit objectives as higher level plans creates a legal requirement for subsequent plans that are 'lower' in the planning hierarchy (such as Forest Development Plans) to be consistent with the landscape unit objectives.

efforts. This would minimize any impact on delivery of landscape unit objectives for the existing two key biodiversity elements over the initial 3 years. Although expanded landscape unit planning needs to involve key stakeholders, the process is primarily a "technical" one. Social choices have already been made by the strategic land use decisions of Cabinet.

The SMZ Working Group recognizes that budget and staffing constraints will limit the extent to which expanded landscape unit planning may occur. Nonetheless, landscape unit planning is potentially one of the most effective tools for achieving SMZ objectives.

The foundations for the landscape unit planning program are already in place, and landscape units within existing SMZs could be short-listed for expanded landscape unit planning where most required (see the suggested criteria in the section titled Prioritise Efforts).

The SMZ Working Group acknowledges concerns that landscape unit planning and "expanded" landscape unit planning may have cost implications. Government and industry are currently working together on these issues and it is important that they be resolved. The Working Group has made no attempt to calculate the costs of expanded landscape unit planning, as this will need to be determined on a case by case basis. It is expected, however, that these costs will not be significant when compared to the environmental, social and economic benefits associated with undertaking expanded landscape unit planning.

Other Planning Processes

Aside from the landscape unit planning program, there are a number of other local planning processes, as listed below, that could be used to address SMZ objectives. For example, coordinated access management planning is identified in a number of strategic plans as important for maintaining SMZ values. (Several local planning processes are described in Appendix 3 of the *Draft Working Group report*, March 2000.)

Other Local Planning Processes That Can Contribute to SMZ Objectives

In addition to landscape unit planning, other local planning processes that can potentially define specific ways to achieve SMZ objectives. Some examples include:

- local resource use plans
- total resource plans
- integrated watershed management plans
- coordinated access management plans
- tree farm licence management plans
- sustainable forest management plan (to support forest certification)
- water use plans
- outdoor recreation management plans
- operational plans prepared under the Forest Practices Code
- management plans for commercial recreation tenures
- ecosystem-based management plans
- pre-tenure plans for oil and gas

The SMZ Working Group recognizes that other planning processes have been designed to accomplish their own purposes, not necessarily to specifically implement SMZ objectives. The processes occur in localized settings to deal with the issues / priorities they were designed to address, however their application is limited by staffing and budget constraints.

The SMZ Working Group believes other planning processes, in combination and over time, represent a significant opportunity to implement SMZ objectives and these efforts need to be supported.

Other planning processes represent a significant potential opportunity to implement SMZ objectives.

Inventory and Research Support

Many land use plans either contain objectives and strategies for obtaining new information to improve the quality of future planning and resource development approvals, or list these inventory and research needs as part of plan implementation. This includes the need to conduct specific resource inventories (e.g. for wildlife or tourism) and research studies to investigate the effects of resource development on particular values.

Strategic planning proposals are designed to obtain better information for managing resources in SMZs. They are proposed to fill gaps in what is known about the location, quality and quantity of resources, and relationships between resource development and the effects on sensitive resource values. In short, they are proposals to reduce uncertainty and risk in managing resources. Some examples are shown in the following box:

Examples Of Objectives And Strategies to Obtain Better Information on SMZ Values

- Identify critical furbearer habitat and incorporate into more detailed plans. (Fort St. John LRMP)
- Identify scenic areas visible from the Parsnip River (Prince George LRMP)
- Support the grizzly and black bear study to define bear population size, movements and mortality within the Columbia Valley east and west of Donald, BC (Kootenay Boundary regional plan)
- Improve the understanding of the behaviour and biology of caribou populations and the effect of resource development on caribou habitat. Develop a ten year research project to evaluate the impact of current guidelines; identify habitats and review attributes required in movement corridors. (Kamloops LRMP)

(a) Resource Inventories

Resource inventories in BC are supported by a variety of programs both within and outside of government. The majority of spending on resource inventories in BC is coordinated through the Corporate Resource Inventory Initiative (CRII) and the Common Land Information Base (CLIB) in support of government's strategic initiatives, including resource planning and First Nations' treaty negotiation processes.

FRBC has contributed sizable sums to inventory work, and individual agencies fund some limited inventories out of their base budgets. Federal programs also greatly assist. In addition, commercial interests and non-government organizations also help contribute to provincial inventories.

Inventories that are prepared must conform with standard methodologies for information collection, storage, analysis, interpretation and reporting that are prescribed by the provincial Resources Inventory Committee (RIC).

The goal behind these approaches is to ensure that inventory spending fits with government's corporate priorities, and that resulting inventory products are consistently high in quality and reliability, and can be integrated with each other without major data compatibility problems.

Strategic plan objective can best be implemented over time where there is good information available from inventories on which to base day-to-day implementation decisions.

Examples Of Inventory Projects
That Contribute to Improved Resource Planning and Decision-Making

- Mid-coast grizzly bear inventory
- Omineca - Peace Bull Trout spawning habitat inventory
- Cariboo region capability and suitability mapping for wildlife
- Kaska Dena moose inventory
- Mountain Goat census for Robson Valley

(b) Research Projects

Government agencies, colleges, universities and the private sector all make investments into research projects that have application across all land types and locations, including SMZs. Studies are undertaken on a wide variety of subjects including:

- adding value to forest products;
- evaluating the impact of forest practices on biodiversity and wildlife,
- timber supply and jobs; and,
- integrated forest management.

FRBC underwrites the province's most significant research program. Research investments, made under the guidance of the Science Council of British Columbia, are made in all five of FRBC's activity areas: land and resources, environment, workforce, communities and value-added.

Examples Of FRBC Research Areas
That May Contribute To SMZ Objectives

- scientific and economic research into various stages of the silviculture cycle aimed at producing healthier forests
- investigation of how forest ecosystems are affected by different management practices, and how detrimental impacts can be mitigated and repaired
- identification of changes in the provinces forest economy and the skills that forest workers will need to be part of the new economy
- transition and economic development planning as a basis for community efforts to strengthen and diversify
- forest harvesting and achievement of wildlife objectives through harvest trials, for example, related to caribou habitat.

Universities and associated research institutes are also involved in SMZ related research. For example, a special trust fund has been made available to the University of Northern British Columbia to undertake research studies in the Muskwa-Kechika area which includes 3 million hectares of SMZs in the northern Rockies.

Much of BC's recent resource inventory investment has been directed at compiling a basic set of reconnaissance level inventories for a wide spectrum of resources to support strategic plan processes (e.g., in order to develop SMZ objectives). As strategic plans have been completed for most of the province; it is therefore important to ensure an appropriate amount of BC's inventory and research funding now be directed to support strategic plan implementation (e.g., in order to achieve SMZ objectives).

The SMZ Working Group recommends that the inventory and research work needed to support local planning efforts be undertaken, particularly where specifically identified by stakeholders in approved land use plans, as key to strategic plan and SMZ implementation.

Inventory and research work needed to support local planning efforts should be undertaken as key to strategic plan and SMZ implementation.

Recommendation 3

Utilize Legal Tools And Review Policy as Required

An important implementation step identified in approved strategic plans is to utilise appropriate legal tools, when needed, to implement aspects of the plan. Several planning tables have also noted the need to review provincial policy barriers to effective plan implementation.

Legal Tools

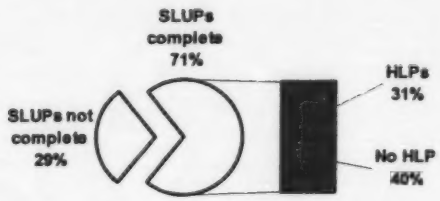
(a) Higher Level Plans

The Forest Practices Code provides for several legal land use designations that can play a strong role in SMZ implementation. The main one is the 'higher level plan' designation[4].

Objectives that pertain to forest resource uses and management practices may be implemented as legally enforceable provisions by being formally established as a higher level plan (HLP) under the Forest Practices Code. For an example, see the recently approved Kootenay Boundary Higher Level Plan at http://www.for.gov.bc.ca/hfp/planning/hlp/Hlplayou.pdf

Establishing resource objectives as higher level plans under the Code has the effect of ensuring that other strategic plans located lower in the Code planning hierarchy, and operational plans for forest management (such as forest development plans and range use plans) are consistent with the objectives for the HLP.

Status of Land Use Planning in BC



Approximately 71% of the province has completed SLUPs, with 31% covered by HLP RMZ objective decisions.

The Act enables five different types of higher level plan designations that could be established to implement SMZ objectives (see flowchart on next page). Generally speaking, the most appropriate higher level plan designation flowing directly from approved strategic plans is for SMZ objectives to be established as Resource Management Zone (RMZ) objectives by the three Code ministers (MOF, MELP and MEM). This is because Cabinet-level land use plans, including SMZs, represent "social choice" decisions resulting from planning processes focused on achieving stakeholder consensus. Translating SMZ objectives into HLPs is therefore often viewed as primarily the responsibilities of elected officials (i.e. the three Ministers).

Having said that, some objectives for biodiversity may be more appropriately addressed as a HLP through landscape unit objectives. And some site-specific objectives in SMZs may be appropriately handled as sensitive area or recreation site or trail HLP objectives.

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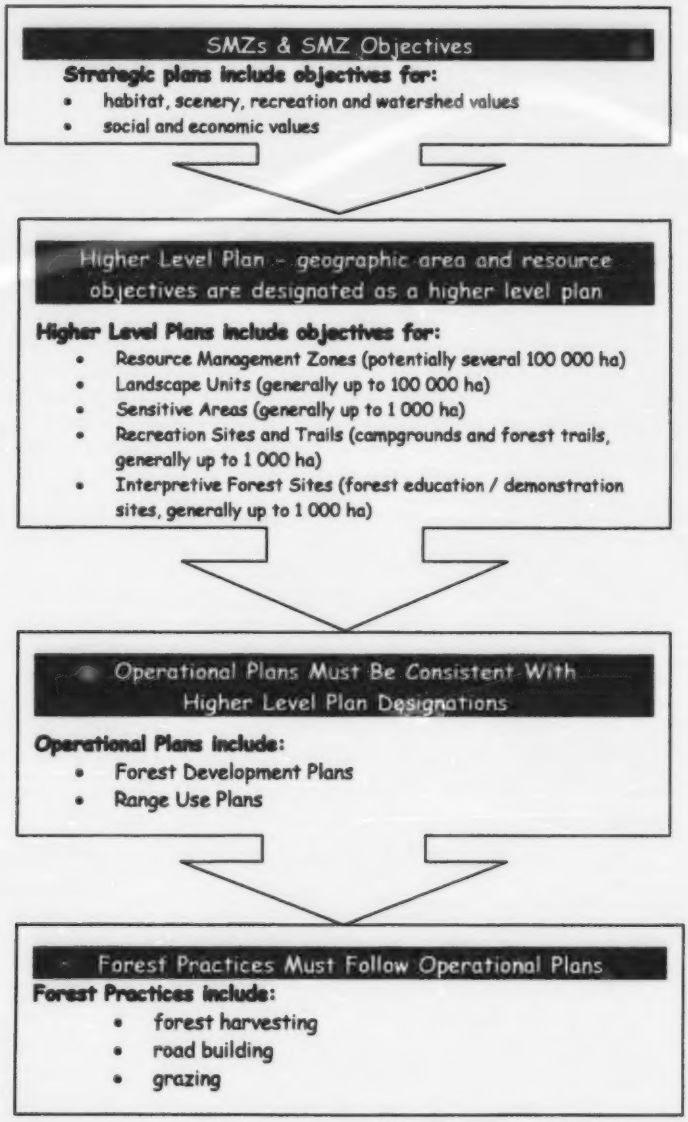
[4] Only SMZ objectives that pertain to management practices for forest resources (e.g., timber, forage, recreation, fish, wildlife, biodiversity, cultural heritage resources) and which can be implemented via operational plans defined in the Forest Practices Code (e.g., forest development plans, silviculture prescriptions) are eligible for establishment as higher level plans.

SMZ objectives that are established as higher level plans under the Code will distinguish land use plan components that must be implemented from those non-HLP components that provide information that may be considered in preparation and approval of Code operation plans. Where appropriate, key provisions of land use plans that vary from normal code management should be established as resource management zone higher level plans.

Where appropriate, key provisions of strategic plans such as SMZ objectives should be established as RMZ higher level plans.

Implementing SMZs Through Higher Level Plan Designation


SMZs & SMZ Objectives
Strategic plans include objectives for:
• habitat, scenery, recreation and watershed values
• social and economic values
Higher Level Plan - geographic area and resource objectives are designated as a higher level plan
Higher Level Plans include objectives for:
• Resource Management Zones (potentially several 100 000 ha)
• Landscape Units (generally up to 100 000 ha)
• Sensitive Areas (generally up to 1 000 ha)
• Recreation Sites and Trails (campgrounds and forest trails, generally up to 1 000 ha)
• Interpretive Forest Sites (forest education / demonstration sites, generally up to 1 000 ha)
Operational Plans Must Be Consistent With Higher Level Plan Designations
Operational Plans include:
• Forest Development Plans
• Range Use Plans
Forest Practices Must Follow Operational Plans
Forest Practices include:
• forest harvesting
• road building
• grazing

In 1996, government established higher level plans for three land use plans: the Cariboo-Chilcotin Land Use Plan, Kamloops LRMP and the Kispiox LRMP. In these cases, higher level plans were established for the entire plan area, including RMZ objectives applicable to Code operational plans. Later, special legislation for the Muskwa-Kechika Management Area legally established objectives for 3 million ha of SMZs within the Fort Nelson and Fort St. John LRMPs.

More recently, HLP RMZ objectives have been approved for the Lakes and Bulkley LRMPs, and the Vancouver Island and Kootenay Boundary Land Use Plans. A HLP decision is expected shortly for the Cassiar Iskut-Stikine LRMP. Additional efforts are anticipated in other approved strategic plan areas.

For some strategic plan areas, SMZ objectives may be effectively implemented without a Higher Level Plan RMZ objective.

For some strategic plan areas, SMZ objectives may be effectively implemented without a Higher Level Plan RMZ objective.

This may be because:

1. the objectives can be addressed through normal Code-based management or through other HLP tools such as landscape unit objectives for biodiversity, or
2. the voluntary efforts by licensees to honour the strategic plans (that they themselves may have endorsed) is sufficient and locally preferred to a regulatory HLP approach, or
3. strategic plans, coupled with the technical merits of key SMZ objectives and strategies (that may be needed to adequately manage and conserve forest resource values), are meant to provide strong policy direction to support statutory decision-makers in making their approval decisions.

(b) Other Legal Tools

Higher level plans represent one important legal tool under the Forest Practices Code that can be used to implement SMZ objectives for forest resources. There are also a number of other legal tools that could potentially contribute to SMZ implementation. Under the Forest Practices Code, examples include establishing community watersheds, ungulate winter range, recreation trails and recreational use restrictions, scenic areas and visual quality objectives, riparian reserves and riparian management areas, and wildlife habitat areas.

In addition, there are a number of non-Code legal tools that can potentially assist with SMZ implementation. These include the forest land reserves, heritage sites and trails, wildlife management areas, and various reserves established under the *Land Act and the Wildlife Act*. These Code and non-Code tools are described briefly in Appendix 3 of the draft Working Group report (March 2000) located at www.luco.gov.bc.ca/smz/mar2000report.htm.

As with the establishment of higher level plans under the Code, use of these other tools establishes a requirement for resource managers to observe certain procedures or to implement particular limitations on land use activities in the established area. In this way, habitat, water, recreation, scenic, cultural, historic or other important resource values may be recognized and given special consideration, while ensuring that permitted resource development proceeds in a viable, responsible manner.

Legal tools under the Code, as well as non-Code legal tools, should be used in a timely manner where necessary to effectively implement SMZ objectives.

The SMZ Working Group recommends that legal tools under the Forest Practices Code (such as higher level plans, scenic areas and ungulate winter range) and/or non-Code legal tools (such as wildlife management areas, forest land reserve) be used in a timely manner where necessary to effectively implement SMZ objectives.

Policy Considerations

Provincial policies exist to help guide a variety of resource decisions. Some of these policies may represent an impediment to achieving SMZ objectives in some areas, and if that is the case, they should be reviewed. Planning tables have sometimes forwarded to government as part of the delivery of their recommendations for land use, policies they feel need to be reviewed to improve opportunities for effective plan implementation. These policy recommendations should be systematically examined for their merits.

The following issues provide some examples of the types of policies that could represent obstacles to achieving SMZ objectives:

1. **Landscape unit planning** – current policy direction could limit the ability of staff and stakeholders to engage in expanded landscape unit planning where it may be necessary to address key SMZ objective in the short term (3-5 years).
2. **Utilization standards** are geared in large part to improve available timber supply and associated revenue, but if requirements are too challenging, it may add costs to forest licensees and reduce residual coarse woody debris needed to improve stand-level biodiversity values in SMZs.
3. **Access management** policies could play an important role in coordinating the access needs of industry with various stakeholders in order to implement the economic and environmental objectives of SMZs.
4. **Timber pricing** for alternative harvesting systems such as partial cutting may not reflect the added costs of these systems nor the added non-timber benefits that could be accrued to society. If the stumpage relief for using these systems is deflected as added stumpage costs for conventional harvesting, there may not be the needed incentive overall to licensees to try innovative approaches in SMZs (i.e., net costs overall are the same). Lowering target revenues to encourage the use of alternative or innovative harvesting systems is a major Crown pricing issue that needs careful examination since it may be critical to achieving SMZ objectives in many areas.
5. **Recreation/tourism and wildlife management** - agreements, similar to the BC Assets and Land Corporation and MELP agreement in the Kootenays, could play an important role in other regions and could also be expanded to involve the Ministry of Forests (public recreation) and the Ministry of Small Business, Tourism and Culture (tourism). Multi-agency tourism/ recreation agreements are needed given the many agencies involved in delivering these programs, and the many stakeholders who are vitally interested in a corporate approach.
6. **Area-based tenures** (as opposed to volume-based tenures) may be important to licensees in seeking forest certification and rewards for good stewardship practices. This may be important in implementing SMZ objectives and the merits and implications should be evaluated.

The SMZ Working Group recommends that government review and amend, where appropriate and in the context of the entire land use plan, policy impediments to implementing SMZ objectives.

As discussed, planning tables themselves have often forwarded to government key policy issues they feel need to be reviewed and amended. Compiling and reviewing this list is a good way of addressing the above recommendation.

It is recommended that government review and amend, where appropriate and in the context of the entire land use plan, any policy impediments to implementing SMZ objectives.

Recommendation 4

Monitor the Achievement of SMZ Objectives

All strategic plans identify the need for plan monitoring. Yet little monitoring work is in fact taking place. There is concern that this key aspect of plan implementation may not be adequately resourced and, as a result, we will not be able to monitor delivery of SMZ objectives and strategies – and, more importantly, to learn and adapt accordingly.

One of the key steps in the planning cycle after strategic plan approval is monitoring. All approved strategic plans specifically mention the need for plan monitoring. To support these efforts LUCO has recently released two working draft papers: *Provincial Monitoring Framework for Strategic Land Use Plans (1999)* and *Strategic Land Use Plan Monitoring Procedures (2000)*. Both reports build on recent monitoring experience for the Kamloops LRMP - the first LRMP approved in the province and therefore the plan area with the most implementation experience.

The framework includes both implementation monitoring (i.e., how well specific strategies and projects identified in the land use plan are being addressed) and effectiveness monitoring (i.e., how well the goals and objectives in the plan are being met). The policy direction in the framework expects that implementation monitoring would be undertaken, but there is no requirement to undertake effectiveness monitoring at this time.

Implementation monitoring can be reported each year while effectiveness monitoring would ideally be undertaken every 3-5 years. The focus on effectiveness monitoring is to define desired outcomes (using the goals and objectives in the approved strategic plan), and identify measurable indicators that help determine whether those outcomes are being achieved. The indicators chosen should ideally be based on available information to reduce the costs associated with new data collection. The feedback provided by both implementation and effectiveness monitoring enables adjustments to be made to improve plan implementation.

In the absence of monitoring, there may be wide and varied opinions from agency staff and stakeholders about whether components of an approved land use plan such as SMZ objectives are being delivered.

In the absence of monitoring, there may be wide and varied opinions from agency staff and stakeholders about whether components of an approved strategic plan, such as SMZ objectives, are being delivered. With completed monitoring reports, opinions may still vary about how well components of a plan are being delivered, however the concerns will likely be more focused since the monitoring results will provide some key baseline information to enable a more informed assessment.

To improve the credibility and comprehensiveness of plan monitoring, ideally a public monitoring group would be formed with key agency staff, stakeholders, general public, local government, and First Nations where they choose to participate. The monitoring team, however, is not a "decision" body in the sense that the planning table is responsible for developing the land use plan. The monitoring group "observes and reports" on how the plan is being delivered, but may make recommendations for improvements to the IAMC, appropriate line agency statutory decision-

makers and to stakeholders involved in aspects of plan delivery. Public monitoring groups need some level of capacity building and funding support to enable plan monitoring.

Monitoring may be one task charged to a follow-up organization or a government supported local organization that has already been formed to provide advice on land stewardship issues within a given area. These types of organizations go by a variety of names, including: round tables, resource advisory committees, community resource boards, working groups, planning committees, resource councils, and partnerships. Some have been initiated and sponsored by government, others are grassroots initiatives. Many are interested in land use and sustainability issues that affect their local areas, and are a valuable resource for improving coordination and cooperation in resource management.

A 1994 survey of community resource boards identified 32 such organizations operating throughout the province . Some were formed to participate in sub-regional planning processes, and are likely to have an ongoing role in strategic land use plan monitoring; others have been formed with more localized resource management interests. Examples include: the Nootka Resource Board, Anahim Round Table, Cariboo Chilcotin Regional Resource Board, Bulkley Community Resource Board, Fort Nelson LRMP Working Group, Kalum Community Resource Board, Howe Sound Round Table on the Environment and the Economy, Mackenzie Land and Resource Advisory Table, North Columbia Resource Council, Naramata Committee for Clean Water, and the Salmon River Watershed Round Table.

The Muskwa-Kechika Advisory Board, made up of a cross section of environmental, economic and other social interests for the area, has a specific mandate, flowing from the land use plan and subsequently established through legislation, to advise on sustainable development practices for the Muskwa-Kechika Management Area that predominantly comprises SMZs.

Plan monitoring is recognized as an essential part of the planning process itself. Without "implementation monitoring," we cannot determine if plan commitments are being acted upon; and without "effectiveness monitoring" we cannot say whether or not plan goals and objectives are being achieved.

Although a policy framework exists to do monitoring, and all strategic plans note that monitoring should be done, the SMZ Working Group remains concerned that this key plan implementation step may not get delivered. The Working Group has heard strong support for monitoring from all sectors.

Consequently, the Working Group strongly recommends that as part of strategic plan monitoring, monitor the extent to which SMZ objectives are being achieved (effectiveness monitoring) and SMZ strategies are being undertaken (implementation monitoring), and use monitoring results to adapt management practices in a cycle of continuous improvement.

The Working Group strongly recommends monitoring strategic plans, including the extent to which:

- **SMZ objectives are being achieved (effectiveness monitoring); and,**
- **SMZ strategies are being undertaken (implementation monitoring).**

To help ensure that monitoring does in fact take place, the Working Group further recommends that, as part of a work plan for each completed land use plan, a schedule be developed for undertaking implementation and effectiveness monitoring. There needs to be demonstrated strong support from government in its budget and resource allocations, committing to the work plan and monitoring.

Other Considerations

The Working Group assessed a number of key issues that were raised with respect to delivery of SMZ objectives. Even though these discussions did not result in any major new recommendations, the Working Group feels it is important to share its reflections on these issues.

Referral Procedures

Referral of development proposals / plans and permit / license applications is the primary way that agency, First Nations and stakeholder input is incorporated into individual resource development decisions. Many development proposals are required to be advertised as well as referred. Agencies with statutory decision-making authority such as MOF District Managers, Designated Environment Officials, MELP Land Commissioners, and Water Rights Comptrollers make their approval decisions on the basis of a wide range of information inputs, including referral comments. Thousands of referrals are processed each year in BC to promote coordinated decision-making.

Standard procedures allow for flexible referral in circumstances where there is a high degree of interest in resource development decisions, as is expected in many SMZs. For example:

- a wider than normal cross-section of groups, including non-government organizations, might be given the opportunity to comment on certain types or locations of proposed development;
- the opportunity may be provided for inter-agency meetings to discuss proposals and agree on a course of action, such as exists currently with the Regional Mines Development Review Committee; and,
- special procedures for addressing inter-agency disputes over development proposals may also be defined through inter-agency memoranda of understanding or local agreements.

Some SMZ strategies indicate the need for an improved level of coordinated decision-making to protect SMZ values — beyond what would occur under normal administrative practices. Where strategic plans clearly stipulate or imply a flexible referral arrangement, it can be generally expected that this arrangement will be implemented. Most plans, however, are silent on this aspect, given that it is not normally appropriate for broad, strategic plans to provide too much detail on the administrative procedures for plan implementation.

The issue that the SMZ Working Group considered is whether or not a blanket referral policy should be developed for SMZs. The Working Group's view on this question is that specific referral practices should be decided at the local level in response to local conditions and development proposal specifics. The need for a blanket referral policy for all SMZs has not been established, and could lead to considerable inefficiencies in approval processes.

The existing flexible referral policy should be retained for making development approval decisions in SMZs.

The existing flexible policy should be retained where agency staff exercise their judgment on the need for expanding the list of referral contacts, or initiating some other method for increasing the level of coordination and cooperation that goes into a development approval decision. Inter-agency protocol agreements that clarify referral procedures could assist in providing direction to regional and district staff. Naturally, where approved strategic plans stipulate that more flexible referral is needed in particular circumstances, then such a process should be implemented.

Approval Decisions

Approval decisions may be required under the Forest Practices Code by a single MOF statutory decision-maker (SDM), or by more than one SDM. For example:

- establishment of RMZ objectives as higher level plans requires the approval of three ministers (MEM, MELP and MOF).
- landscape unit and sensitive area objectives are established by MOF district managers with approval of the MELP Designated Environment Official (DEO), except for recreation resources.
- approval of both the MELP deputy minister and the MOF chief forester is required to establish ungulate winter range, identified wildlife and general wildlife measures, and threatened and endangered fish.
- "joint approval" of forest development plans by both the MOF district manager and DEO is required where:
  - the area is a community watershed;
  - a higher level plan specifies that joint approval is required; or,
  - the MOF district manager and the DEO agree on the need for joint approval.

The purpose of these provisions is to ensure that an appropriate balance is struck between economic development and conservation considerations when development proposals are being evaluated and decided upon.

The question addressed by the SMZ Working Group is whether or not the practice of joint approval should be expanded in SMZs, given the preponderance of environmental and backcountry values in SMZs.

Arguments in favour of joint approval of forest development plans in SMZs include the following:

- decision-making is more 'corporate' and balanced, particularly if SMZ objectives are not established as higher level plans and / or are open to interpretation;
- the increased likelihood that enforceable and 'monitorable' conditions for conserving SMZ values will be established in operational plans / permits;
- is one way of demonstrating that resource management in SMZs is different than non-SMZ lands; and.
- is consistent with the recommendations of some planning tables.

Arguments against the concept of joint approval in SMZs include:

- single approval (by MOF) is potentially more efficient - there is risk of approval delays with joint approvals;
- joint approval may not result in a demonstrable increase in environmental protection, particularly if SMZ objectives are established as clear and enforceable higher level plan objectives;
- single approval provides for clear accountability in approval decision-making, and,
- some planning table participants have not accepted the notion of joint approval.

In either case, approval decisions are made easier when resource objectives are clear, resource values are known (together with specified measures for conserving those values), the information provided in a proposed forest development plan is of high quality, and there exists good communication between agencies, licensees and other stakeholders.

The Working Group's conclusion on this issue is that where an approved strategic plan provides direction on joint approvals, this direction should be honoured and implemented. The Working

Group, however, could not reach agreement on what to do in situations where approved strategic plans give no direction on joint approval.

Dispute Resolution

Resource management direction that is provided in strategic plans for SMZs is normally quite general, and must often be interpreted into subsequent resource planning and approvals decisions. Wherever this occurs, the potential exists for differences of opinion to arise over the plan's intended management direction. Tenure holders, other stakeholders, the general public, First Nations, and other government agencies may hold different viewpoints on what is meant by SMZ objectives, or what is required to implement existing laws, regulations or policies in SMZs. This may be particularly so where approved plans were not based on a full consensus among the planning participants.

BC has over 40 different resource management statutes and many more regulations and policies that government officials employ when allocating, managing and regulating natural resources. In making resource management decisions, officials with delegated decision-making authority (i.e., statutory decision makers) exercise considerable discretion. They interpret laws, regulations, policies and plans; they balance conflicting interests and information; they exercise judgment.

The potential for disputes over resource management in SMZs is often greater.

One of the important checks and balances on administrative discretion is a dispute resolution system for addressing complaints about decisions — complaints from the public, stakeholders, First Nations, proponents and other government agencies. Although the same opportunities for dispute resolution apply across the broader landscape, the potential for disputes over resource management in SMZs is potentially greater.

There are a number of options for airing and resolving these potential conflicts. They range from informal administrative review procedures to formal, legalistic appeal procedures, and include:

1. review within the decision-making agency;
2. referral to inter-agency management committees;
3. complaints to the Office of the Ombudsman;
4. appeals to quasi-judicial boards or commissions (e.g., Forest Practices Board); and,
5. judicial review.

These mechanisms are described in Appendix 5 of the *Draft Working Group report* (March 2000) available on the LUCO website at http://www.luco.gov.bc.ca/smz/mar2000report.htm

In addition, strategic plans themselves may define procedures for addressing implementation disputes. As well, inter-agency agreements, designed to clarify administrative roles and responsibilities, often include dispute resolution provisions (e.g., memorandum of understanding between Ministry of Forests, Ministry of Environment, Lands and Parks, Ministry of Energy and Mines, and Department of Fisheries and Oceans respecting Forest Practices Code implementation.)

The SMZ Working Group's assessment of the question of dispute resolution in SMZs is that there are sufficient existing administrative and legal mechanisms for addressing conflicts over SMZ implementation; therefore no new mechanisms are required.

Good communication and informal discussion at the local level can resolve many land and resource issues before they become larger disputes.

Many land and resource disputes arise out of miscommunication or misunderstanding on issues that can be overcome by simple and

informal methods at the local level. Agency staff and development proponents often prevent disputes by engaging in early and meaningful consultation with key affected interests. Timely intervention, such as a simple phone call or brief meeting to explain a proposal or to review options, is sometimes all that is needed to prevent a relatively minor issue from escalating into a larger dispute.

Concluding Observations

The SMZ Working Group offers the following observations as further context for its recommendations.

A Work in Progress

SMZs and SMZ objectives are an outcome of extremely complex and challenging land use planning processes. BC's strategic land planning program for Crown land is unique on the world scene in terms of its scope and scale, its commitment to inclusiveness, and the significance of the planning decisions.

Although the processes, the products, and the means to implement the products are not perfect, we should not expect perfection at this early stage in the evolution of such an ambitious planning program. Success at articulating and implementing SMZ and other strategic plan objectives will improve over time as we continue to gain experience. It's important that we maintain a focused momentum in strategic plan development, and especially delivering the plans that are developed. Although we are close to having completed a first round of strategic land use plans for the whole province, the job of land use planning in BC is far from over.

SMZs in Context

Implementing SMZ objectives must not occur independently of implementing other plan objectives for other zones. Planning Tables developed plans as "integrated packages" of objectives and strategies, and plan implementation actions must respect that intent. Implementing plans in their totality, including objectives and strategies for enhanced and general resource management zones, will help to ensure that SMZ objectives are achieved.

SMZ "Objectives" are Key

Evaluating resource management action in SMZs, and trying to determine whether or not it is "special", should not be the focus. "Special management" (in context of implementing SMZs) consists of the measures needed to meet the objectives for the area. In some cases, this may not differ greatly from practices in other resource management zones. We must always consider success or failure in implementing SMZs in relation to area-specific SMZ objectives.

SMZs as "Show Cases" for Innovation

SMZs provide an opportunity for resource management innovation. Innovation could take the form of experimenting with activities that promote SMZ objectives, potentially including, but not limited to: eco-forestry management practices; low impact resource development technologies; approaches for integrating / maximizing opportunities for non-timber forest resources; participatory local planning processes that incorporate local knowledge and priorities; and allowing flexibility in applying existing policies that can potentially constrain the achievement of SMZ objectives.

These and other measures should be undertaken with a view towards continuous learning and adaptive management. In this sense, SMZs may become the "vanguard" areas that a number of groups expected SMZs to be — not because management practices are necessarily different in all SMZ areas, but because SMZs are the locations in BC where we stress innovation and an adaptive management approach.

Refining SMZ Management Direction

The strategic planning level (given scale, informational and process limitations) is capable of addressing some planning issues, but not all. The concept of a hierarchy of planning levels is accepted and, in this sense, it has always been expected that additional "lower level" planning

would, in most cases, be required to interpret often general strategic plan direction into more detailed and precise management direction.

In addition, some SMZs were viewed as "parking areas" for unresolved issues that required further local planning. Objectives were left intentionally vague on the understanding that local planning would occur to refine the management direction.

Coordination is Key

BC does not have comprehensive Crown land planning legislation that assigns clear roles and responsibilities for plan development and implementation. Strategic plan processes are founded in policy. The policy, in general terms, is for agencies to cooperate to support the development of strategic plans, and to also implement these plans through inter-agency cooperation.

IAMCs are the primary vehicle for achieving inter-agency cooperation at the field level, and they play a central role in plan implementation. This role can be difficult at times because IAMCs are comprised of agency representatives whose prime accountability is to their mandated programs and legislation. Continued efforts and resources to ensure effective IAMC functionality are essential to successfully achieving SMZ (and other plan) objectives.

Plan Implementation Resources

Plan implementation activities often require extra resources that have not been provided to agencies. Although some of these activities are being undertaken, by government and licensees, out of base budgets and through small-scale special purpose allocations, the amounts are limited.

Government has invested heavily in strategic land use plan development over the last decade. Planning decisions have helped to significantly reduce land use conflicts and provide increased land use certainty. But, unless the plans are substantially implemented, these benefits may not materialize in the long-run. There are potential opportunities to gradually re-direct existing budgets for developing strategic plans to improve plan implementation, monitoring and review. This can be done without having to earmark new, incremental budgets for these purposes.

First Nations Relationships

First Nations participation in processes to develop strategic plans has varied widely. Cabinet-approved strategic plans, including SMZ objectives, represent government's interests in land use at the treaty negotiating table. These interests, however, may not necessarily be reflected in the final decision on land selection.

The period between land use plan approval and treaty settlements may be considerable. Many First Nations are not participating in the BC treaty process. There is a need for close and ongoing dialogue during this period with First Nations on plan implementation to ensure that First Nations' perspectives are taken into account in agency decision-making.

Meaningful consultation with First Nations in some situations can be difficult because of First Nations' capacity issues. Also, views vary on what consultation measures and implementation roles should look like. Flexible, ongoing efforts are needed to overcome these issues so that strategic plans, including SMZ objectives, (and also treaty negotiations) may be implemented efficiently and effectively in the longer-run.

Shared Responsibility

Because the provincial government coordinates and funds strategic land use planning processes and Cabinet approves the resulting plans, the assumption is often made that the Province has sole responsibility for implementing SMZ (and other plan) objectives.

In fact, implementing SMZ objectives should be viewed as a joint responsibility between the provincial government, other orders of government, communities, tenure holders, and stakeholder

associations. All of these groups participated in plan development and most plans reflect a consensus among them. Additionally, most plan areas have multi-stakeholder committees that can oversee plan implementation and monitoring. An ongoing sharing of plan implementation responsibilities is required if SMZ objectives are to be achieved effectively and efficiently.

References

The following documents provide additional information on SMZs, the SMZ Project and SMZ Working Group findings. All SMZ Working Group documents (as well as this report) are available on the LUCO website at: www.luco.gov.bc.ca/SMZ/home.htm

Special Management Zone Action Plan, June 1998.

Special Management Zone Information Report, June 1998

SMZ Working Group Sub-committee Report, *Planning, Referrals and Approvals*, Draft in-progress, 1999.

SMZ Working Group Sub-committee Report, *SMZ Economic Development Survey Provincial and Regional Summaries*, Draft in-progress, 1999.

SMZ Working Group Sub-committee Report, *Status of SMZs*, Draft in-progress, 1999.

SMZ Working Group Draft Report, *Implementing SMZ Objectives*, March 2000

SMZ Working Group *Workshop Summary*, June 2000.

Monitoring documents:
(Available online at http://www.luco.gov.bc.ca/lrmp/home.htm)

LUCO. *Provincial Monitoring Framework for Strategic Land Use Plans* - Working Draft, July 1999

LUCO. *Strategic Land Use Plan Monitoring Procedures* - Working Draft, May 2000

LUCO Thompson-Okanagan IAMC. *Kamloops LRMP Monitoring Report*, 1999.

Other documents mentioned in this report include:

Cooperman, Jim. 1998. *Keeping the Special in Special Management Zones: A Citizen's Guide.* BC Spaces for Nature.

Ministry of Forests in cooperation with Ministry of Environment, Lands and Parks & Land Use Coordination Office. 1998. *Guide to Writing Resource Objectives and Strategies.* (available online at http://www.for.gov.bc.ca/hfp/planning/writing.htm)

Ministry of Forests, 2001 Higher Level Plans: This brochure is available online at: *http://www.for.gov.bc.ca/hfp/planning/hlp/Hlplayou.pdf*

Senez, Paul (compiler and editor). 2000. *The BC Forest Certification Forum Proceedings.* 2000 (available online at http://www.ecoforestry.ca/forum/proceedings/transcript.htm)

Glossary of Selected Terms

Adaptive management: an approach to managing uncertainty that emphasizes learning by trial. Management policies and practices are adopted, based on best available information, and monitored to assess effects. Adaptations to those policies and practices are made periodically, on the basis of monitoring information to incorporate "lessons learned".

Biogeoclimatic zone: a geographic area having similar patterns of energy flow, vegetation, and soils as a result of a broadly homogenous macro-climate. British Columbia has 14 biogeoclimatic zones.

Biodiversity: the diversity of plants, animals and other living organisms in all their forms and levels of organization, including genes, species, ecosystems, and the evolutionary and functional processes that link them.

Consistency: management objectives or prescriptions in one plan that direct on-the-ground activities do not materially conflict with management objectives or prescriptions in another plan.

Forest Development Plan: an operational plan guided by the principles of integrated resource management which details the logistics of timber development, usually over a five-year period. Methods, schedules and responsibilities for accessing, harvesting, renewing and protecting forest resources are set out to enable site specific operations to proceed.

Forest resources: defined in the *Forest Practices Code of British Columbia Act* as resources and values associated with forests and range including, without limitation, timber, water, wildlife, fisheries, recreation, botanical forest products, forage and biological diversity.

Higher level plan (HLP): defined in the *Forest Practices Code of British Columbia Act* as an objective for:

- a RMZ;
- a landscape unit or sensitive area; or
- a recreation site, recreation trail, or interpretive forest site.

Land and Resource Management Planning (LRMP): an integrated sub-regional consensus-based process requiring public participation that produces a Land and Resource Management Plan for review and approval by government. The plan establishes direction for land use and specifies broad resource management objectives and strategies.

Landscape unit: an area of land and water used for long-term planning of resource management activities. It is important for designing strategies and patterns for landscape level biodiversity and for managing other forest resources. A landscape unit may be used by the District Manager to establish objectives for any purpose permitted under section 2 of the *Forest Practices Code of British Columbia Act*.

Local planning: a term referring to a variety of resource planning initiatives undertaken to develop integrated approaches to resource use and development. Typically, these have been undertaken to resolve potential land use conflicts in areas smaller than LRMPs and regional plans.

Local Resource Use Plan (LRUP): a plan approved by the District Manager for a portion of the Provincial Forest that provides area specific resource management objectives for integrating resource use in that area. These plans are prepared pursuant to section 4(c) of the Ministry of Forests Act.

Objective: a concise, measurable statement of a desirable future condition for a resource or resource use which is attainable through management action.

Old growth/old seral: forests of a certain age or forests with the appropriate old forest attributes. Old growth and old seral are used interchangeably.

Old Growth Management Areas (OGMAs): areas of old growth forest that are mapped during landscape unit planning processes or an operational planning process and managed to provide the ecosystem benefits that are attributed to old growth trees. The Forest Practices Code biodiversity guidebook and landscape unit planning guide set out target levels of old growth forest retention across the province. Old growth management areas, in combination with other areas where development is prevented or constrained, will be used to achieve biodiversity targets.

Operational plans: within the context of the *Forest Practices Code of British Columbia Act*, operational plans detail the logistics for forest and range development in particular locations. Methods, schedules, and responsibilities for accessing, harvesting, renewing, and protecting the resource are set out to enable site specific operations to proceed. Operational plans include forest development plans, logging plans, range use plans, silviculture prescriptions, and stand management prescriptions.

Protected Area: a designation of areas of land and water set aside to protect natural heritage, cultural heritage or recreational values (may include national park, provincial park or ecological reserve designations).

Regional land use plan: either the Cariboo Chilcotin Land Use Plan, the West Kootenay-Boundary Land Use Plan, the East Kootenay Land Use Plan, or the Vancouver Island Land Use Plan.

Resource Management Zone (RMZ): a geographic area within the larger planning area that is distinct from other geographic areas with respect to biophysical characteristics, resource values, or resource management direction. RMZs are normally delineated and corresponding resource management objectives and strategies defined as a consequence of a regional or sub-regional planning process. RMZs are a planning unit that may be established under the *Forest Practices Code of British Columbia Act*.

Seral stage distribution: the distribution of different aged ecosystems through time. In the context of this report, the distribution of early, mature and old forests through time.

Strategic land use planning: a participatory style of planning for relatively extensive geographic areas that focuses on defining land and resource allocation and management goals and objectives and corresponding strategies.

Strategies: means of achieving a resource objective.

Timber Supply Review (TSR): an assessment of how current forest management practices will affect the supply of wood available for harvesting over time. It also assesses how timber supply may be affected by changes in management practices and uncertainties about forest inventory and growth.

Visual Quality Objective (VQO): a resource management objective established by the District Manager or contained in a higher level plan that reflects the desired level of visual quality based on the physical characteristics and social concern for an area. Five categories of VQO are commonly used: preservation; retention; partial retention; modification; and maximum modification.

Watershed: an area of land that collects and discharges water into a single main stream through a series of tributaries.

Wilderness: an area of land generally greater than 1000 ha that predominantly retains its natural character and on which the impact of humans is transitory and, in the long run, substantially unnoticeable.

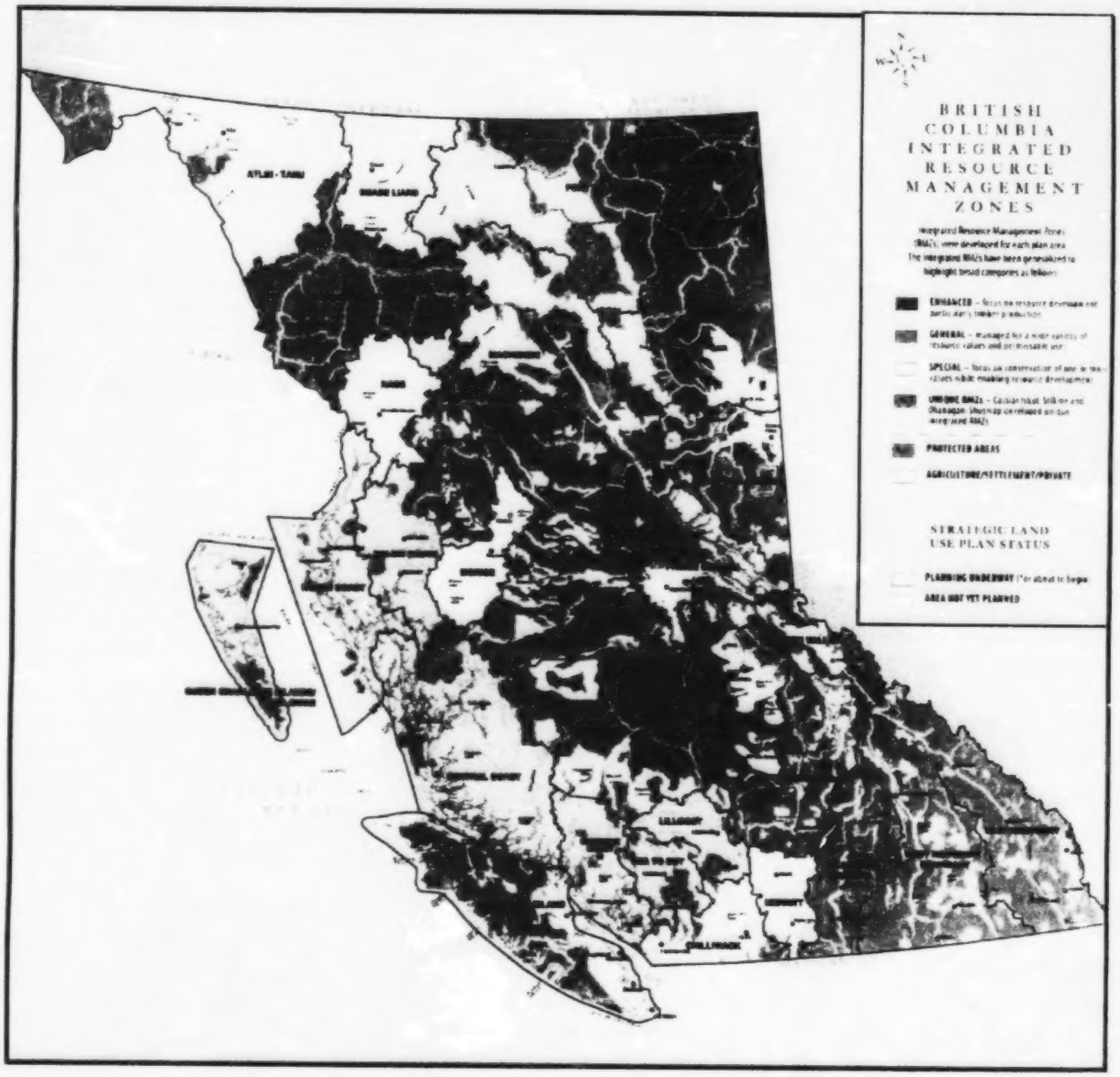
Wildlife Trees: a tree or group of trees that are identified to provide present or future wildlife habitat. For example, a wildlife tree might be a decaying snag that contains insects and grubs that are an important food source for birds.

Appendices

Appendix 1: SMZ Working Group Membership

Member's Name	Alternate's Name	Interest
Public Members		
Larry Andrews		First Nations
John Bergenske		Environment
Jim Burbee		Forest - Community
Stan Coleman	Gerry Fraser	Forest Industry
Don Griffiths / Doug Leavers		Recreation
Lloyd Manchester	Dave Neads	Environment
Paul Senez		Environment
Roger Shaneman	David Stuart	Oil and Gas
Bill Wareham		Environment
Dave Peterson	Guenter Weckerle	Forest Industry
Government Members		
Rod Davis	Elizabeth Williams	MELP
Stephen Connolly / Gordon Goodman		MSBTC
Graeme McLaren	Colin Magee	MEM
Bruce Sieffert	Al Balogh	MOF
Terje Vold		LUCO, Chair
Executive Support		
Jim Walker	MELP	
Ken Baker / Bronwen Beedle	MOF	
David Johns / Derek Thompson	LUCO	

Appendix 2:
Map of Resource Management Zones



Resource Management Zones in January 2001

Appendix 3:
SMZ Working Group Terms of Reference

Note: The following Terms of Reference is taken directly from the SMZ Action Plan approved by government in June 1998. Further consultation resulted in modifications to the SMZ project which were reflected in a subsequent FRBC funding proposal prepared by government and the SMZ Working Group in March, 1999.

Terms of Reference for the Special Management Zone (SMZ) Working Group will be confirmed by the Working Group and approved by the Deputy Ministers of Ministry of Forests (MOF), Ministry of Environment, Lands and Parks (MELP) and the Ministry of Energy and Mines (MEM).

Term: 2 years, to be reviewed in two-years time

Appointment: by the Deputy Ministers of MELP, MOF and MEM
Facilitation/Chair: Land Use Coordination Office

Membership: a small group, knowledgeable about, but not necessarily representatives of, First Nations, environmental, recreation and tourism, forest, mining, oil and gas interests and relevant government agencies (MELP, MOF, MEM, the Ministry of Small Business, Tourism and Culture, the Ministry of Fisheries, and the Ministry of Agriculture and Food).

Working Teams: smaller working groups may be formed to accomplish specific tasks

Reporting: to Deputy Ministers of MELP, MOF and MEM Advice and direction will be provided by the ADMs Land Use Committee on policy recommendations and other matters as required.

Liaison: To avoid duplication and confusion, the SMZ Working Group will confer with an inter-agency government committee comprised of representatives of the Coordinating Committee of the Landscape Unit Planning Task Force, Integrated Resource Planning Committee, Enhanced Forest Management Pilot Project, Joint Management Committee of the Forest Practices Code Steering Committee and land-use plan implementation teams.

Budget: Within 60 days of being appointed, the SMZ Working Group will develop a workplan based on the SMZ Action Plan and including a budget proposal for the 1998/99 fiscal year, including administrative support as required. The workplan and budget will be submitted to the Deputy Ministers for approval.

Consultation: The Working Group will use the January 23, 1998 workshop participants as a "sounding board" to review proposals such as this draft terms of reference, proposed solutions to outstanding provincial policy issues, and proposed pilots; workshop participants, in turn, will consult their associated organizations for further communication and feedback.

Scope: The SMZ Working Group is responsible for the following items:

A. SMZ short list:

In close consultation with regional government staff and planning tables, develop a prioritised list of those SMZs that have the best chance of realizing their SMZ objectives. The SMZ Working Group will establish criteria to assist in discerning which SMZs have the best chance of realizing their SMZ objectives. Criteria will include but not be limited to such factors as the extent and history of development activities within an SMZ, and the ecological capacity of the SMZ.

The SMZ short list will be used to identify potential candidates for pilot projects, described below, and areas for further work/studies.

The short list will be developed using:

- existing processes which have already determined priorities for SMZs (e.g. some planning areas have already ranked areas with respect to Landscape Unit planning needs)
- regional input to identify top five SMZ areas in each planning jurisdiction
- risk assessment of SMZs in jeopardy of losing special values
- an approach which reflects the full range of SMZ values

This exercise will **not attempt to rank all 225 SMZ** areas but focus on the most critical 50 SMZs. The identification of priority SMZs must be done in the context of other RMZs and their combined contribution to land-use objectives for the plan area.

B. Pilots:

The SMZ Working Group will select a minimum of three SMZ pilot areas across the province where application and observation of alternative planning or referral processes and methods for industrial development, as a means to deliver SMZ objectives, may be practiced.

Prior to the selection of pilots, the Working Group will articulate clear goals and deliverables of SMZ pilot projects, including the following:

- information and costs on alternative industrial development methods
- guidance on existing SMZ objectives (as discussed under *C* below)
- ascertaining the need for long-term or total resource plans of alternative development practices
- development of efficient and timely referral/approval procedures for industrial or commercial development
- indicators to measure the utility of the pilot projects
- opportunities to apply successful outcomes of pilot project to other areas
- linkages to other resource activities including recreation, tourism, guide-outfitting and trapping
- developing guidance on how to effectively plan for conserving one or more priority resource value

Selection of pilots and administration of the pilot projects will be based on factors including the following:

- informed input from existing land-use planning tables and regional staff

- representation of a full range of SMZ resource values and objectives
- representation of major SMZ policy issues, including mineral exploration and development and general access management issues
- experience gained in selection of enhanced forest management pilots
- alternative practices need not be applied to entire SMZ
- opportunities to find resolution to challenging and pressing conflicts between resource development and conservation

> **Note:** The scope of the project explicitly **excludes revisiting approved SMZ boundaries or objectives.** However, it will seek to clarify objectives by developing operational guidance for pilot areas. This information will likely direct provincial criteria and guidelines that future SMZs should meet to avoid confusion and to reduce the interpretive variation of objectives.
>
> The SMZ Working Group **will not revisit or "review" existing approved SMZ objectives.** Moreover, the consultation carried out as part of this project will not be a route of appeal for parties disputing approved land-use plans and objectives. Opportunities to change SMZ boundaries or objectives are provided in each land-use plan through approved amendment procedures.

C. Provide guidance on existing SMZ objectives:

In close consultation with other land-use and resource agencies, committees and bodies (including land-use planning tables, community resource boards, IAMCs, implementation teams, and landscape unit planning groups) develop guidance for pilot areas to increase clarity about existing SMZ objectives. This guidance will be provided in a format that readily assists resource managers in exercising their statutory authorities regarding the approval or acceptability of operational activities. It will also explicitly address integration of industrial development activities with other SMZ values.

Guidance will address Issues 5 and 6 of the SMZ Information report SMZ objectives which do not appear mutually compatible or biophysically suitable for the area; objectives which, as stated, represent particular modes of operation or management rather than management goals; and objectives which include targets and impact limits, some of which are unclear or considered mutually exclusive.

D. Prepare funding proposal:

SMZ Working Group to develop a joint-funding proposal (between government, industrial interests and other stakeholders), for submission to Forest Renewal British Columbia (FRBC).

The proposal will:

- be coordinated with other related initiatives
- focus on support for SMZ pilot projects, monitoring, evaluation and the operation of the SMZ Working Group
- incorporate complementary experience from funding efforts for the Enhanced Forest Management Pilots
- identify funding needs for pilot activities that are beyond the scope of FRBC mandate such as mineral and oil and gas development

The emphasis of the funding request will be for field work (i.e. inventory, research,

mapping, etc) associated with the pilot projects. The request will also propose, according to a prioritized schedule, support for restoration and enhancement activities necessary to meet SMZ objectives.

E. Provide policy recommendations on issues including:

1. Provincial criteria and guidelines respecting the purpose and intent of SMZ designation

The SMZ Working Group, in consultation with relevant planning agencies and committees, will develop provincial criteria and guidelines for SMZs. The purpose of these recommendations will be to guide the future designation and management of SMZs. The recommendations will serve to clarify the intent and overall purpose of SMZs (as discussed under Issue 1 of the SMZ Information Report).

The recommendations will not result in a change to existing approved SMZ boundaries, objectives, targets or strategies - but rather provide a guide for their implementation. As stated above, opportunities to change SMZ boundaries, objectives, targets and strategies are provided by individual land-use plans through approved amendment procedures.

In addressing the overall purpose and intent of SMZs the criteria and guidelines will examine issues including the following:

- honouring, through implementation, the management commitments made through land-use plans
- the basis and process for establishing future SMZ boundaries (as discussed under Issue 2 of the SMZ Information Report)
- the relationship between value-oriented management practices prescribed by the Forest Practices Code and SMZ status (as discussed under Issue 7 of the SMZ Information Report)
- SMZ management consistent with timber supply guidelines approved by government
- the spatial and temporal scales within which special management practices and processes are appropriately measured, i.e. landscape versus site; years versus decades (as discussed under Issue 11 of the SMZ Information Report)
- clarifying integration of industrial uses and regulatory requirements with other SMZ values to improve investor certainty (as discussed under Issue 10 of the SMZ Information Report)
- application of access management in SMZs
- managing to higher visual quality standards in SMZs with high scenic values

2. Economical development in SMZs

The SMZ Working Group will examine, in consultation with related agencies and bodies, opportunities to increase the economic feasibility of alternative development techniques in SMZs (as discussed under Issue 9 of the SMZ Information Report).

This examination will include, but not be limited to, a review or analysis of:

- SMZs where no industrial development is occurring
- the application of innovative techniques in SMZ pilot areas and a compilation of other initiatives examining innovative techniques

- incentive programs for research and development of alternative techniques
- existing and proposed economic incentives to licencees for the use of alternative techniques, especially during periods of low markets for natural resource commodities
- approaches addressing safety concerns, especially related to alternative forest practices
- existing initiatives in labour intensive management techniques which create jobs, encourage innovative practices and result in increased benefits from existing resource extraction levels
- research into special markets which may emerge to meet value-added, certified products harvested from SMZs using alternative techniques

The examination will ensure the needs of industrial sectors (i.e. forest, mineral, oil and gas) are identified separately so that management techniques accurately reflect the needs of each sector.

3. Referral, approval and permitting processes in SMZs

The SMZ Working Group will review, in consultation with government agencies, the Joint Management Committee of the Forest Practices Code Steering Committee and relevant stakeholders, the referral, approval and permitting processes applied to industrial development activities in SMZs.

This review will look to efficiencies which may be gained through streamlining of referral and approval processes, while maintaining adequate consultation necessary for thorough decisions. Elements to be examined (as discussed under Issue 4, 8 and 12 of the SMZ Information Report) include:

- analysis of referral and approval processes used for industrial development activities in SMZs, including cost/benefit implications
- information requirements of referral and approval processes
- role of land-use plans and their interpretations in referral and approval processes
- role and contribution of local-level planning in referral and approval processes
- public and stakeholder input to approval and referral processes
- ensuring the outcomes of approval and referral processes are focused on meeting SMZ objectives

4. Linkages with landscape unit planning and public consultation

The SMZ Working Group, in consultation with the Coordinating Committee of the Landscape Unit Planning Task Force, will examine linkages between SMZ designation and landscape unit planning, including public consultation.

This examination will recognize that the immediate focus of landscape unit planning is on the maintenance of biodiversity and that landscape unit planning is not currently designed to address other important identified SMZ values. It is anticipated that future landscape unit planning and other planning processes will address a broader range of resource values.

The examination of linkages with landscape unit planning will focus on pilot areas to address:

- priorities for local level planning such as landscape unit planning in SMZs

- necessary resources for local level planning such as landscape unit planning in SMZs
- appropriate levels of public consultation on landscape unit plans and other local level plans for areas in SMZs
- ensuring access and sharing of SMZ information for local level planning between government agencies and stakeholders

5. Evaluation and monitoring framework for SMZ objectives and values

The SMZ Working Group will, in consultation with the Integrated Resources Planning Committee, develop and recommend an evaluation and monitoring framework for SMZ objectives and values, especially to enable adaptive management.